

CP-3 On-line Reporting Application

The Community Preservation Act (CPA) has proven to be a very effective way for municipalities to raise revenue and receive a match from the Commonwealth for historic preservation, affordable housing, and open space and recreation purposes. Millions of dollars have been spent by municipalities for these purposes on thousands of projects across Massachusetts.

Information on how these CPA funds have been spent is important for a variety of reasons. It provides each Community Preservation Committee (CPC) access to case studies and examples of how their peers have utilized CPA resources. Data on projects also helps the public understand how CPA funds have been invested to achieve the goals of the Act.

It is the CPC at the local level that is officially charged with recordkeeping in section 13 of the Act:

The community preservation committee shall keep a full and accurate account of all of its actions, including its recommendations and the action taken on them and records of all appropriations or expenditures made from the Community Preservation Fund. The committee shall also keep records of any real property interests acquired, disposed of or improved by the city or town upon its recommendation, including the names and addresses of the grantors or grantees and the nature of the consideration. The records and accounts shall be public records.

The paper-based CP-3 form has been the primary reporting tool for approved CPA projects. However, as the number of CPA communities has increased, a more efficient means of gathering and providing statewide information on CPA spending has become desirable. Requiring CPA communities to submit an enhanced on-line version of the CP-3 Form and the creation of a master database for CPA projects has been selected as the solution.

The new CP-3 form is an electronic software application that provides a suite of on-line forms to collect information about Community Preservation Act (CPA) projects, including a description, status, funding, timeline and location. The information will be stored in a database at MassGIS and will be freely accessible to Community Preservation Committees and other municipal board and commissions, to other state agencies and the public. Besides being important to local CPCs as outlined above, this information will also be very useful to state agencies concerned with housing, environmental resource protection, recreation and historic preservation and to regional planning agencies as well. For MassGIS (part of the Executive Office of Energy and Environmental Affairs) this represents the only practical way to get details about CPA-funded open space projects. It also helps the Commonwealth account for the millions in matching funds distributed annually.

Municipalities will benefit from this new CP-3 application by having an entire history of their CPA approved projects stored in one place. Since the Act passed in 2000, many parties have played a role in the tracking CPA expenditures, most notably the Community Preservation Coalition. In working with MassGIS to help design the database, the Coalition gathered information from a variety of sources including the CP-3 project reporting forms, municipal officials, municipal websites and the Community Preservation Committee (CPC) of many CPA communities. This project information has been pre-loaded into the CP-3 application, reflecting appropriations approved through the end of FY07. Communities should review and update this information the first time they use the application.

Data collected via the CP-3 Form is stored in a database accessible from the MassGIS website at http://www.mass.gov/mgis/cpa_points.htm. See the "Accessing and Using CPA Data" section of this guidance for details. This provides quick access to data on the use of CPA funds.

Municipalities are required to start using the application this fall, and communities should begin with entering projects from FY2008 and verifying projects from previous years. Beginning in FY2009, communities will not receive matching funds unless all projects from the current fiscal year have been entered.

Instructions for using the CP-3 Online Application

General navigation and guidance

After logging in users can proceed to enter information about a new project or edit an existing project. As users enter project information it is possible to go back and forth between data pages until the project is completely entered. Users should be particularly mindful that it is crucial that they use the built-in form navigation buttons which are the grey "<<back" and "next>>" buttons in the application. This is why the CP-3 application does not run inside the usual browser frame. Also, users should be aware that if there is no activity for 30 minutes the application session will expire and the data they've entered so far will be lost. The application incorporates visual feedback to ensure users that required information has been accurately provided. If required fields are incomplete or incorrectly filled out they will be highlighted in light red and additional prompts in the form of error messages will help the user to complete the form correctly. Not all fields (boxes) on the application must be completed. Fields are optional in those cases where users might not know the answer. Note: Firefox 3 does not run the application properly and should not be used at this time. However, Firefox 2 or Internet Explorer will work properly.

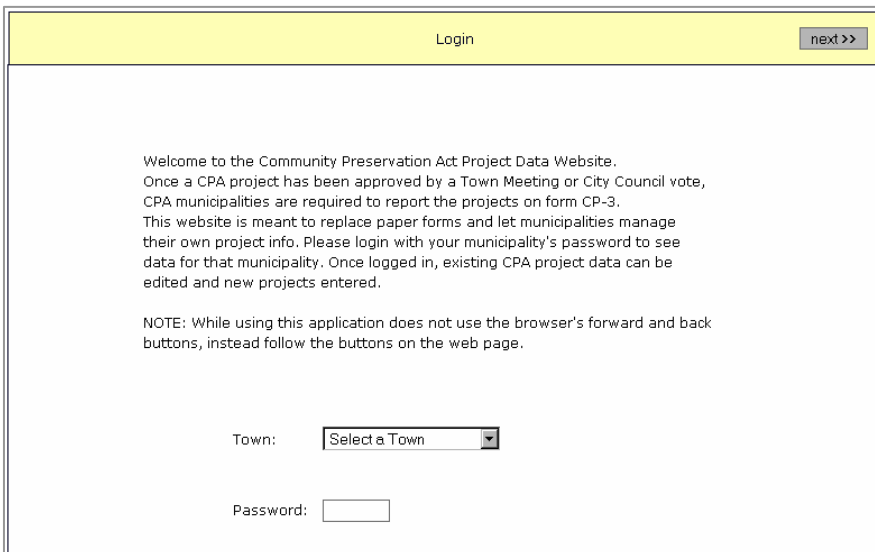
Help

Questions should be directed to Division of Local Services' Municipal Databank email: databank@dor.state.ma.us or 617-626-2384

Login

In order to ensure that information is entered into the proper file the CP-3 form utilizes a username and password system.

Image 1:



Login

next >>

Welcome to the Community Preservation Act Project Data Website.
Once a CPA project has been approved by a Town Meeting or City Council vote, CPA municipalities are required to report the projects on form CP-3. This website is meant to replace paper forms and let municipalities manage their own project info. Please login with your municipality's password to see data for that municipality. Once logged in, existing CPA project data can be edited and new projects entered.

NOTE: While using this application does not use the browser's forward and back buttons, instead follow the buttons on the web page.

Town:

Password:

The Login Page is shown in **Image 1**. Users will log in using the password that has been provided to the Community Preservation Committee Chair by the Department of Revenue. If you need to obtain your community's username and password please send an email to:

databank@dor.state.ma.us or 617-626-2384

User Information

Image 2:

User Information

next >>

Please give us some information in case there are questions about your entered data.

Choose your Name: (or "New Name") New Name

New Name:

Choose your Community Preservation title (or "Other"): CPC Vice Chair

Please give us your email and phone.

Email:

Phone #:

Initially, there will be no users saved in the system and each new user will need to visit the User Information Page (**Image 2**) to enter a unique user name of their choosing, pick or enter a title, and provide either an email or phone number. As soon as the user clicks "next>>" on this page, their info is entered into the database. On subsequent visits to

the website the user's unique name will appear in the dropdown list at the middle of the page and it will not be necessary to reenter this information unless updates are needed.

Using the CP-3 Application for the first time

Image 3:

Update Existing CPA Project								
Before entering new CPA projects, please take a moment to review a summary of existing CPA projects for your municipality. A red "Verified" column color indicates the project has not been reviewed, green indicates it has been reviewed. Click the "Edit this Project" button in the "Verified" column to edit the project information.								
Data base ID	Project Name	Approval Date	Project Types	Appropriation Types and Amounts	Project Description	Site Address	Status	Verified
3015	28 Willow St. and 214 Central St. Acquisition	4/ 15/ 2006	Housing	CPA Housing: \$160000 CPA Total: \$160000 Other: \$42500 Total Cost: \$202500	Funds to help the Acton Community Housing Corporation (ACHC) acquire property at 28 Willow St. and 214 Central St. to develop up to 3 units of community housing.	28 Willow St.	Project in progress	<div>Edit This Project</div>
3016	AHA rental housing planning and feasibility study	4/ 15/ 2006	Housing	CPA Housing: \$25000 CPA Total: \$25000 Total Cost: \$25000	To fund a study by the Acton Housing Authority exploring how to use and apply new rules concerning how housing authorities can leverage resources (hopefully to allow AHA to maintain and expand its rental housing		Project in progress	<div>Edit This Project</div>

When using the CP-3 Application for the first time, most communities will first see a list of CPA projects approved from FY2002 through FY2007 on the "Update Existing CPA Project" page. These projects have been entered into the system from data collected by a variety of sources including the

Community Preservation Coalition and previous versions of the paper-based CP-3 form. It is

strongly recommended that municipalities verify and, if necessary, edit the information on each of these projects so that an accurate CPA project history will exist for your community.

If the municipality has no existing projects in the database the application will direct the user to a blank Project Info Page (**Image 4**).

Projects are listed on the Update Existing CPA Project Page in alphabetical order. On the right hand side of the page users will notice that the boxes for certain projects in the “Verified” column are shaded either red or green. A project shaded red has not been edited by the community. If a project has been edited by the community the box in the “Verified” column will be shaded green. This color scheme is intended to help users remember which projects have been previously edited. If the user chooses to edit an existing project they will be directed to the “Project Info” page. Data on this and subsequent pages have been automatically filled in from the database. Users can also click on the button at the bottom of the page to enter a new project.

Entering or Updating Project Info

Image 4:

Project Info		next >>
Project Name:	If the project is another phase of an existing project, please choose the name, otherwise choose "NEW PROJECT" (Please do not provide bond payment info).	
	NEW PROJECT	
Name of New Project:	Freeman Farm	
Approval Date: (Date of Town Meeting or City Council Vote to Approve Expenditure)	June 1 2007	Project Status: Project in planning stage
Project Type (choose all that apply):	<input checked="" type="checkbox"/> Open Space <input checked="" type="checkbox"/> Community Housing <input checked="" type="checkbox"/> Recreation <input checked="" type="checkbox"/> Historic Preservation	
Is the appropriation to a fund/trust (specific project work to be determined at the discretion of the fund/trust)?	<input type="radio"/> Y <input checked="" type="radio"/> N	
Project Description:	new housing on site of Freeman Farm	
Housing Units Anticipated or Created:	New Construction: 2	Rehabilitation: 3 Total: 5
Does this phase of the project involve purchasing a legal interest in land (fee, CR, APR, etc)?	<input checked="" type="radio"/> Y <input type="radio"/> N	Open Space Acres: 10.2 Housing Acres: 5 Recreation Acres: 0 Historic Acres: 0 TBD Use Acres: 1.1 Total Acres: 16.3
Seller of Legal interest (Grantor):	Mrs. Butterworth	

Projects are entered into the database or updated via the Project Info page. In the case of a new project, users should enter a project name, approval date, and the project's status. The approval date should be the actual date that the legislative body (Town Meeting or City Council) voted to appropriate the funding, not the date that the CPC

might have voted to recommend the project.

In addition users will check off one or more project types, specify whether the appropriation is to a fund/trust, enter a project description, and indicate whether the project involves purchasing a legal interest in land. The question on appropriations to a fund or trust is designed to capture a project which transfers CPA funds to an Affordable Housing Trust Fund or a Conservation Fund. Users should check the Yes box when the appropriation transfers CPA funds to such a fund.

If the project is for housing, users will be prompted to enter estimated unit counts for new construction and/or rehabilitation of existing units. It is permissible to leave the unit count as zero if the number of units cannot be estimated, or if the expenditure will not result in the production of units. However, it would be important to update the information for this project in the future if units are eventually produced, so that the data on units created is accurate for your community.

If the project involves purchasing a legal interest in land, users will be prompted to enter acreage as appropriate. In some cases, the exact breakdown of acres between the different CPA categories may not be known at the time the project is entered in the database. In these cases, the total number of acres should be entered in the “To Be Determined” box. It would be important

to update the information for this project in the future once the exact acreage breakdown has been determined. The total acreage figure is calculated for the user. Acres can be fractional. If the project involves purchasing a legal interest in land, the user must enter the name of party selling the property.

Project Funding Source

Of course, it is important to know how projects were funded. To that end, the new CP-3 form has a page (see **Image 5** below) to enter all of the funding associated with CPA projects. On the top of the page users will enter the breakdown of funds expended from the Community Preservation Fund, and at the bottom of the page boxes are provided to enter project funding from other, non-CPA sources. At least one of the boxes associated with CPA funding must contain a dollar value. The portion of the project being funded from CPA sources is totaled automatically, as is the Total Project Cost. Project funding should be entered as numbers only. If commas, letters, or symbols such as \$ are entered users will be prompted to enter only numbers. Also, if a dollar value is entered in the "Other" box then a description must be provided for the project to be successfully submitted.

In some cases, the exact breakdown of funding between the different CPA categories may not be known at the time the project is entered in the database (for example, a parcel that has been acquired for a joint open space/housing project with the exact spending ratio not yet finalized). In these cases, users can enter the cost of the project in the "CPA TBD Amount" box. It would be important to update the information for this project in the future once the exact spending breakdown has been determined.

Image 5:

Project Funding Source	
Freeman Farm, Approval Date 1/ 1/ 2001	
Please identify each of the funding sources that make up the total expenditure for this project. We're looking to capture the total funding necessary to complete this project, not just the funds requested in the warrant article or city ordinance.	
CPA Open Space Funds:	2500000
CPA Housing Funds:	500000
CPA Recreation Funds:	0
CPA Historic Funds:	0
CPA TBD Amount:	0
CPA Bonded Amount:	2000
CPA Total:	3002000
From a Trust/Fund (Affordable Housing Trust Fund, Conservation Fund, Land Acquisition Fund or other such fund)	0
Other Town Funds (Non-CPA):	5000
Private Donations:	0
State Funds (self help, APR program, etc):	0
Federal Funds:	123
Other (Please describe below):	0
Total Project Cost:	3007123

If the project is being funded by bonding against future CPA revenues, the full dollar value of the bond should be entered in the "CPA Bonded Amount" box and the term of the bond entered in years. If the length of the bonding period is not known then users should enter

zero in the box. Please note that projects that are bonded should be entered only once. Debt service payments over the loan period are not entered into the project database as they do not represent a new project.

Geographic Information page

Local governments, the Commonwealth, and other will benefit from being able to locate and map projects funded via the CPA. The Geographic Information page shown in **Image 6** below collects the information necessary to do so. Of course, not all projects have a geographic component (for example provision of soft-second home loans, contributing to a local conservation fund, or

preservation of historic records) so the user must first make that determination. If the project is not geographic in nature then users should select the "No" radio button. The project data will be saved and the user will be directed to the Final page. If the project does have an associated location the user should choose the "Yes" radio button and enter available geographic information on the page - either an address or a description such as the map/block/lot or parcel id.

When the user has entered geographic information on the project and clicked the "next >>" button at the top right of the page, the application takes the pieces of the address and tries to geocode them (get a point to approximate the address). The CP-3 application can usually geocode the location if the address contains either a number, street, and zip code or a number and a street (since the application already knows which municipality) OR 2 streets. A successful geocode will result in a map on the screen zoomed in to a particular neighborhood with a red dot on the location of the project itself. If the address information is incomplete or for some other reason the addresses could not be geocoded, the map page will show the outline of entire town, with the red dot in the center of the town.

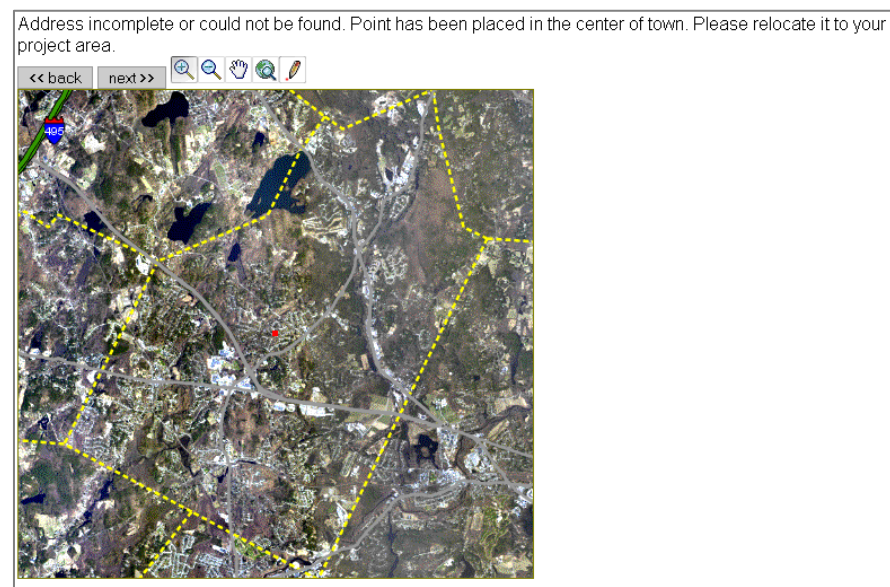
Image 6:

Please note that if the user is entering a new project then relevant geographic data must always be entered. However, if the user is updating an existing project then a location or point may already be in the database for that project. If there is a point in the database, the application assumes that this is the best location and does not try to

re-geocode the address.

Map Page

Image 7:



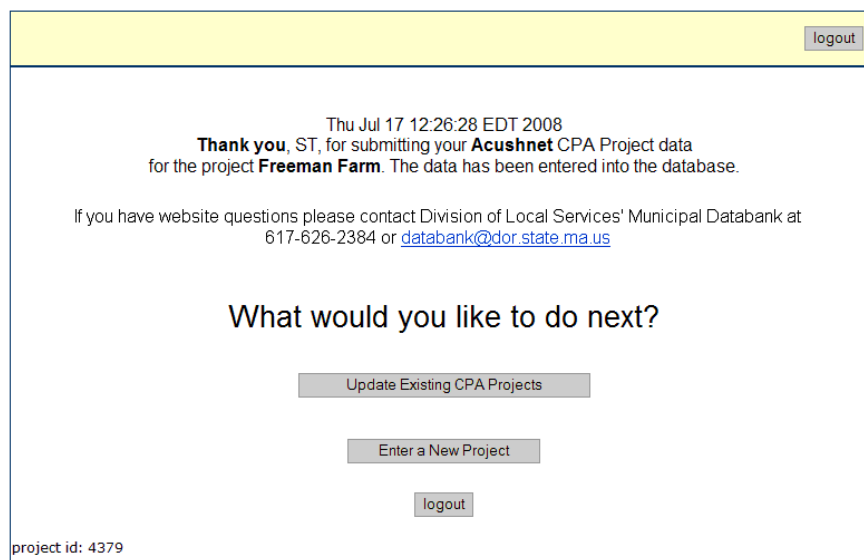
Once geographic information has been entered for a project a map associated with the project will appear on the Map Page (**Image 7**). At the top of the Map Page text will indicate to the user whether the

red point on the map showing the project location came from a previously entered project in the database, was geocoded from an address, or was placed in the center of the town. If the geocoding was successful the map will be zoomed in to the relevant neighborhood, with the red dot indicating the approximate address of the project. If the location of the project is accurate, (on the historic house, or somewhere in the parcel of land), the user should click the "next>>" button and the project information will be saved.

If the red dot is not in the right location (the geocoding is in error or was unsuccessful) the tools provided on the Map Page should be used to move the point to the correct place on the map. To move the point users should click on the pencil tool and then click on the map in the correct location. The red dot will move to this spot on the map. The user may also zoom in (plus magnifying glass tool), zoom out (minus magnifying glass tool), move sideways (hand tool), or return to the original view of the map (world tool).

Final page

Image 8:



Thu Jul 17 12:26:28 EDT 2008

Thank you, ST, for submitting your **Acushnet** CPA Project data for the project **Freeman Farm**. The data has been entered into the database.

If you have website questions please contact Division of Local Services' Municipal Databank at 617-626-2384 or databank@dor.state.ma.us

What would you like to do next?

Update Existing CPA Projects

Enter a New Project

logout

project id: 4379

After an individual project has been entered the user will be directed to the page shown in **Image 8**. At this point the project information has been saved to the database and summary information is presented to the user - the date, the town name, the project name and a project id number in the lower left corner. The user can print

this information for their records. From this page the user can also choose to go back to the list of existing projects for their community (which will now include the new project they just entered, or an updated version of the project they just edited), or click on the button to enter a new project. Finally, the user may logout (this is not necessary, but in Internet Explorer it nicely closes the browser). They can also click the upper right x of the browser window to close the browser.

Accessing and Using CPA Data

The primary purpose of the new CP-3 form is to provide easy access to accurate data on the use of Community Preservation Act funds. Once a community has updated their FY2002-2007 data, and entered the new CPA projects from FY2008, each community's entire CPA project history will be available on the MassGIS website at http://www.mass.gov/mgis/cpa_points.htm.

On this page community by community project lists can be accessed that list nearly 50 potential fields that can be sorted by column.

Case Studies: Municipal Use of the CP-3 Application

In order to supplement the above guidance six samples are provided below that illustrate how a municipality should complete the new CP-3 Form. Each of the case studies takes an actual warrant article or city ordinance for a CPA appropriation, and then steps through how to enter this project in the CP-3 application.

Case Study #1:

To see if the Town will vote to appropriate or reserve from the **Community Preservation** annual revenues in the amounts recommended by the Community Preservation Committee for committee administrative expenses, community preservation projects and other expenses in fiscal year 2009, with each item to be considered a separate appropriation:

Appropriations:

From FY 2009 estimated revenues for Committee Administrative Expenses	\$ 45,000
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Reserves:

From FY 2009 estimated revenues for Historic Resources Reserve	\$ 90,000
From FY 2009 estimated revenues for Community Housing Reserve	\$ 90,000
From FY 2009 estimated revenues for Open Space Reserve	\$ 90,000
From FY 2009 estimated revenues for Budgeted Reserve	\$550,000

Discussion for CPA Project Database: *None of the items in this warrant article would be entered into the online CPA project database. This warrant article contains the annual budget of the CPC, including the 10% reserves in each of the three CPA categories, the CPC administrative account, and the CPA Budgeted Reserve. The CPA Project Database is designed to capture appropriations ONLY for specific CPA projects, not the annual CPA budget items.*

If there is no project activity nothing needs to be entered into the CP-3 database, but an email should be sent to let us know that this is the case. Division of Local Services' Municipal Databank email: databank@dor.state.ma.us or 617-626-2384

Case Study #2:

To see if the Town will vote to appropriate \$25,000 in legal and acquisition costs, and \$725,000 in land purchase expense, for a total appropriation of **\$750,000 to enable the Town of Boxford to acquire for Open Space and Conservation purposes, and to authorize the Board of Selectmen to accept the deed to the town of fee simple interest or less, of two parcels of land on Main Street, Boxford, Essex County, Massachusetts, being a portion of the property known as the Cargill property**, the first parcel consisting of 7.5± acres of open land identified as Map 26, Lot 2, Parcel 6 in the records of the Boxford Assessors; and the second parcel consisting of 7.0± acres of open space identified as Map 26, Lot 2, Parcel 26 in the records of the Boxford Assessors, on file with the Town Clerk together with all flowage rights and easements and subject to all well rights and easements; said land to be managed by the Boxford Conservation Commission; and that to fund said purchase, **to transfer \$700,000 from the Undesignated Community Preservation Fund balance; the Town's intention is to fund the remaining \$50,000 needed for the purchase through expenditure of private donations received therefore;** and to authorize the Conservation Commission and the Board of Selectmen to submit on behalf of the town any and all applications deemed necessary for grants and/or reimbursements from the Commonwealth of Massachusetts, or the United States, under the Self-Help Act (M.G.L. Chapter 132A § 11) and/or any other state or federal programs including those in aid of conservation land acquisition; and/or any others in any way connected with the scope of this Article; said gifts or grants to be deposited in the Undesignated Community Preservation Fund balance; and that the Board of Selectmen be authorized to grant a perpetual conservation

restriction in said parcels of land meeting the requirements of M.G.L. Chapter 44B, § 12 and M.G.L. Chapter 184, §§ 31-33, as may be deemed appropriate, and to enter into all agreements and execute any and all instruments as may be necessary on behalf of the Town of Boxford to affect said purchase, said funds to be expended by the Conservation Commission and the Community Preservation Committee; or take any other action thereon.

Discussion for CPA Project Database: This acquisition of land would be entered in the online CPA Project Database. The dollar figure to enter would be the full \$750,000 appropriation, as that is the total amount of the warrant article. But, you'll notice that only \$700,000 is from CPA funds. The other \$50,000 is private donations, so those two amounts would be entered in the "Project Funding Source" page.

Project Info		next >>
Project Name:	If the project is another phase of an existing project, please choose the name, otherwise choose "NEW PROJECT" (Please do not provide bond payment info). <input type="text" value="NEW PROJECT"/>	
Name of New Project:	<input type="text" value="Cargill Property Purchase"/>	
Approval Date: (Date of Town Meeting or City Council Vote to Approve Expenditure)	<input type="text" value="July"/> <input type="text" value="5"/> <input type="text" value="2008"/>	Project Status: <input type="text" value="Project in planning stage"/>
Project Type (choose all that apply):	<input checked="" type="checkbox"/> Open Space <input type="checkbox"/> Community Housing <input type="checkbox"/> Recreation <input type="checkbox"/> Historic Preservation	
Is the appropriation to a fund/trust (specific project work to be determined at the discretion of the fund/trust)?	<input type="radio"/> Y <input checked="" type="radio"/> N	
Project Description:	<input type="text" value="Enable the Town of Boxford to acquire for Open Space and Conservation purposes, and to authorize the Board of Selectmen to accept the deed to the town of fee"/>	
	Open Space Acres:	<input type="text" value="14.5"/>
Does this phase of the project involve purchasing a legal interest in land (fee, CR, APR, etc)?	<input checked="" type="radio"/> Y <input type="radio"/> N If you know or can estimate the number of acres for each CPA category, complete the appropriate boxes. Otherwise	TBD Use Acres: <input type="text" value="0"/> Total Acres: <input type="text" value="14.5"/>
Seller of Legal interest (Grantor):	<input type="text" value="Mr. Cargill"/>	

<< back next >> Project Funding Source			
Cargill Property Purchase, Approval Date 7/ 5/ 2008			
Please identify each of the funding sources that make up the total expenditure for this project. We're looking to capture the total funding necessary to complete this project, not just the funds requested in the warrant article or city ordinance.			
For CPA expenditures, if you know or can estimate the dollar amount for each CPA category, complete the appropriate boxes. Otherwise, just put the category-unknown CPA dollar amount in the "CPA TBD Amount" box:	CPA Open Space Funds:	700000	
	CPA Housing Funds:	0	
	CPA Recreation Funds:	0	
	CPA Historic Funds:	0	
	CPA TBD Amount:	0	
	CPA Bonded Amount:	0	Bond Term 0
	CPA Total:	700000	
	From a Trust/Fund (Affordable Housing Trust Fund, Conservation Fund, Land Acquisition Fund or other such fund)		
		0	
	Other Town Funds (Non-CPA):	0	
Non CPA Funds	Private Donations:	50000	
	State Funds (self help, APR program, etc):	0	
	Federal Funds:	0	
	Other (Please describe below):	0	
	Total Project Cost:	750000	

<< back next >> Geographic Information	
Site Address:	Does project have street address or other physical location? <input checked="" type="radio"/> Y <input type="radio"/> N
Enter number and street, or street and crossstreet:	Number: <input style="width: 50px;" type="text"/> Street Name: <input style="width: 150px;" type="text"/>
	Cross street Name: <input style="width: 250px;" type="text"/> Zip: <input style="width: 50px;" type="text"/>
Map(s)/Block(s)/Lot(s) OR Book(s)/Page(s) OR Parcel Id(s) OR Other physical description	Please enter map/block/lot or book/page or parcel id information if available, and indicate which type of information is being supplied - e.g. Map: Block: Lot: or Book: Page: or Parcel Id: Or enter other physical description (e.g. adjacent to Green Park, etc) <div style="border: 1px solid black; padding: 2px; min-height: 40px;"> Map 26, Lot 2, Parcel 6 Map 26, Lot 2, Parcel 26 </div>

Case Study #3:

To see if the Town will vote to appropriate the sum of **\$720,000 to preserve the historic Lincoln Hall, 675 Main Street, West Boxford Center**; including all costs incidental and related thereto; said rehabilitation expenses as necessary for Lincoln Hall to continue to serve as a community meeting place, including but not limited to improvements needed to meet modern codes such as installing insulation, new heating and air conditioning systems, insulating doors and windows,

installing handicapped lift and bathrooms, and updating the electrical system, and that to fund such rehabilitation, \$25,000 shall be appropriated from the Community Preservation Committee Historic Resources Reserve, \$20,000 shall be transferred from the FY '08 Budgeted Reserve, and the treasurer, with the approval of the Selectmen, shall be authorized to issue debt in the amount of \$675,000 under the Community Preservation Program, for a term of 20 years, for the rehabilitation of historic resources, pursuant to Massachusetts General Laws, Chapter 44B or any other enabling authority, said funds to be expended under the direction of the Community Preservation Committee and the Board of Selectmen or to take any other action thereon.

Discussion for CPA Project Database: This project was funded by taking \$45,000 from existing CPA funds and bonding \$675,000. Both amounts would be entered in the "Project Funding Source" page. When entering a CPA project that is fully bonded, or bonded in part, the entire amount of the bond is entered at the time the project is approved by the legislative body. In subsequent years, the annual debt service payments on the bond **are not** entered in the CPA project database. You only enter the project once with the full bonded amount in the year in which it was approved.

Project Info		next >>
Project Name:	If the project is another phase of an existing project, please choose the name, otherwise choose "NEW PROJECT" (Please do not provide bond payment info). <input type="text" value="NEW PROJECT"/>	
Name of New Project:	<input type="text" value="Lincoln Hall"/>	
Approval Date: (Date of Town Meeting or City Council Vote to Approve Expenditure)	<input type="text" value="July"/> <input type="text" value="5"/> <input type="text" value="2008"/>	Project Status: <input type="text" value="Project in planning stage"/>
Project Type (choose all that apply):	<input type="checkbox"/> Open Space <input type="checkbox"/> Community Housing <input type="checkbox"/> Recreation <input checked="" type="checkbox"/> Historic Preservation	
Is the appropriation to a fund/trust (specific project work to be determined at the discretion of the fund/trust)?	<input type="radio"/> Y <input checked="" type="radio"/> N	
Project Description:	<input type="text" value="Preserve the historic Lincoln Hall, 675 Main Street, West
Boxford Center; including all costs incidental and related
thereto; said rehabilitation expenses as necessary for"/>	
Does this phase of the project involve purchasing a legal interest in land (fee, CR, APR, etc)?	<input type="radio"/> Y <input checked="" type="radio"/> N	

<input style="border: none;" type="button" value=" << back "/> Project Funding Source <input style="border: none;" type="button" value=" next >> "/>																																											
Lincoln Hall, Approval Date 7/ 5/ 2008																																											
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<input style="border: none;" type="button" value=" << back "/> Geographic Information <input style="border: none;" type="button" value=" next >> "/>	
Site Address:	Does project have street address or other physical location? <input checked="" type="radio"/> Y <input type="radio"/> N
Enter number and street, or street and crossstreet:	Number: <input type="text"/> Street Name: <input type="text" value="Middleton Rd."/>
	Cross street Name: <input type="text" value="Main St."/> Zip: <input type="text" value="01921"/>
Map(s)/Block(s)/Lot(s) OR Book(s)/Page(s) OR Parcel Id(s) OR Other physical description	<p>Please enter map/block/lot or book/page or parcel id information if available, and indicate which type of information is being supplied - e.g. Map: Block: Lot: or Book: Page: or Parcel Id: Or enter other physical description (e.g. adjacent to Green Park, etc)</p> <div style="border: 1px solid black; padding: 5px; min-height: 40px;"> Map 26, Lot 2, Parcel 6 Map 26, Lot 2, Parcel 26 </div>

We are trying to collect geographic data for projects, if the project has a geographic component. The online CP-3 application will turn an address into a point on a map that can be moved. Each project can have one point (if there's more than one, try to pick one location). If you don't have an address, but have selected the "Y" radio button for physical location, the red dot will initially be in the center of the town and can be moved to the correct location.

Address found. Please wait for the map.



Does the **red dot** represent the correct location of this project? If yes, click the grey next button at the bottom of the page.

To move the red dot: Click on the pencil tool, then click once on the map in the new location. The red dot will be move to where you click. Can be moved more than once.

To zoom in: Click the magnifying glass with a plus sign, then click on the map or draw a box with the mouse.

To zoom out: Click on the magnifying glass with minus sign, then click on the map.

To move the map: Click on the hand tool, then hold down mouse and drag on the map.

To zoom to initial map extent: Click on the world tool.

The currently selected tool will have a grey background. Note: Photo date spring 2005.

<< back

next >>

Case Study #4:

VOTED: That pursuant to the recommendation of the Concord Community Preservation Committee, the Town appropriate \$1,431,383 from the Community Preservation Fund, of which \$454,422 shall come from the undesignated fund balance at June 30, 1006 and \$976,961 shall come from the projected Fiscal Year 2008 fund revenues, to be expended under the direction of the Town Manager as follows:

Item	Project/Description	Amount	Category	Source of Funds	
				Prior Year Fund Balance	FY08 CPA Fund Revenues
A	Concord Housing Authority Elderly Housing, Ammendolia Land	\$60,000	Housing		\$60,000
B	Town of Concord Harvey Wheeler Clock Tower	40,000	Historic Preservation		40,000
C	Concord Housing Development Corp. Feasibility Studies and Land Acquisition	100,000	Housing		100,000
D	FOPAC, 51 Walden	60,000	Historic		60,000

	Stage renovation		Preservation		
E	Scout House Structural repairs	15,000	Historic Preservation		15,000
F	Friends West Concord Depot Railroad Station exterior renovation	220,000	Historic Preservation		220,000
G	Thoreau Farm Trust Renovation Thoreau birthplace	200,000	Historic Preservation		200,000
H	Save Our Heritage Barrett Farm House	200,000	Historic Preservation	141,938	58,062
I	Town of Concord Administrative Expenses	30,000	Administrative	30,000	
J	Housing Reserve	213,245	Housing	141,242	72,003
K	Open Space Reserve	293,138	Open Space	141,242	151,896
Totals		\$1,431,383		454,422	976,961

Discussion for CPA Project Database: Each of the above projects would receive a separate entry in the online CPA Project Database, even though they were presented in one warrant article. Items I, J and K are part of the annual budget of the CPC and would not be entered into the project database. The CPA Project Database is designed to capture appropriations ONLY for specific CPA projects, such as items A through H above, not the annual CPA budget items shown in I, J and K. The projects presented above have minimal information listed. More information might be necessary to insert the project into the database. For example, a more detailed description, or number of acres or housing units.

Case Study #5:

ARTICLE 30: TRANSFER FUNDS FROM COMMUNITY PRESERVATION FUND TO MUNICIPAL AFFORDABLE HOUSING TRUST FUND

To see if the Town will vote to appropriate and transfer from the Community Preservation Fund a sum of money to be deposited in the Harvard Municipal Affordable Housing Trust Fund, or pass any vote or votes in relation thereto. (Inserted by Community Preservation Committee)

Voted majority yes that the Town transfer from the Community Preservation Fund the sum of \$110,209 to be deposited in the Harvard Municipal Affordable Housing Trust Fund.

Project Info		next >>
Project Name:	<p>If the project is another phase of an existing project, please choose the name, otherwise choose "NEW PROJECT" (Please do not provide bond payment info).</p> <div style="border: 1px solid black; padding: 2px;">NEW PROJECT</div>	
Name of New Project:	<div style="border: 1px solid black; padding: 2px;">Harvard Municipal Affordable Housing Trust Fund</div>	
Approval Date: (Date of Town Meeting or City Council Vote to Approve Expenditure)	<div style="display: inline-block; border: 1px solid black; padding: 2px;">July</div> <div style="display: inline-block; border: 1px solid black; padding: 2px;">5</div> <div style="display: inline-block; border: 1px solid black; padding: 2px;">2008</div>	Project Status: <div style="border: 1px solid black; padding: 2px;">Project in planning stage</div>
Project Type (choose all that apply):	<input type="checkbox"/> Open Space <input checked="" type="checkbox"/> Community Housing <input type="checkbox"/> Recreation <input type="checkbox"/> Historic Preservation	
Is the appropriation to a fund/trust (specific project work to be determined at the discretion of the fund/trust)?	<input checked="" type="radio"/> Y <input type="radio"/> N	
Project Description:	<div style="border: 1px solid black; padding: 2px;">Transfer from the Community Preservation Fund a sum of money to be deposited in the Harvard Municipal Affordable Housing Trust Fund.</div>	
Affordable Housing Units Anticipated or Created:	New Construction: <div style="border: 1px solid black; padding: 2px;">0</div>	Rehabilitation: <div style="border: 1px solid black; padding: 2px;">0</div> Total: <div style="border: 1px solid black; padding: 2px;">0</div>
Does this phase of the project involve purchasing a legal interest in land (fee, CR, APR, etc)?	<input type="radio"/> Y <input checked="" type="radio"/> N	

Project Funding Source		next >>
Harvard Municipal Affordable Housing Trust Fund, Approval Date 7/ 5/ 2008		
<p>Please identify each of the funding sources that make up the total expenditure for this project. We're looking to capture the total funding necessary to complete this project, not just the funds requested in the warrant article or city ordinance.</p>		
For CPA expenditures, if you know or can estimate the dollar amount for each CPA category, complete the appropriate boxes. Otherwise, just put the category-unknown CPA dollar amount in the "CPA TBD Amount" box:	CPA Open Space Funds: <div style="border: 1px solid black; padding: 2px;">0</div> CPA Housing Funds: <div style="border: 1px solid black; padding: 2px;">110209</div> CPA Recreation Funds: <div style="border: 1px solid black; padding: 2px;">0</div> CPA Historic Funds: <div style="border: 1px solid black; padding: 2px;"></div> CPA TBD Amount: <div style="border: 1px solid black; padding: 2px;">0</div> CPA Bonded Amount: <div style="border: 1px solid black; padding: 2px;">0</div> Bond Term <div style="border: 1px solid black; padding: 2px;">0</div> CPA Total: <div style="border: 1px solid black; padding: 2px;">110209</div>	
Non CPA Funds	From a Trust/Fund (Affordable Housing Trust Fund, Conservation Fund, Land Acquisition Fund or other such fund) <div style="border: 1px solid black; padding: 2px;">0</div> Other Town Funds (Non-CPA): <div style="border: 1px solid black; padding: 2px;">0</div> Private Donations: <div style="border: 1px solid black; padding: 2px;">0</div> State Funds (self help, APR program, etc): <div style="border: 1px solid black; padding: 2px;">0</div> Federal Funds: <div style="border: 1px solid black; padding: 2px;">0</div> Other (Please describe below): <div style="border: 1px solid black; padding: 2px;">0</div> <div style="border: 1px solid black; height: 15px; width: 100%; margin-top: 5px;"></div>	
	Total Project Cost: <div style="border: 1px solid black; padding: 2px;">110209</div>	

Geographic Information		next >>
Site Address:	Does project have street address or other physical location? <input type="radio"/> Y <input checked="" type="radio"/> N	

Discussion for CPA Project Database: CPA funds are often transferred to a Municipal Affordable Housing Trust Fund. When an appropriation is to a fund, select the "Y" radio button on the "Project Info" page next to "Is the appropriation to a fund/trust (specific project work to be determined at the discretion of the fund/trust?"

In these cases, the exact use of the money is often not known at the time that the legislative body approves the appropriation. In subsequent years, once the funds are actually spent by the affordable housing trust, the details of that expenditure should be entered in the project database as a new project. The cost of the project should be entered on the "Project Funding Source" page in the box labeled "From a Trust/Fund."

Case Study #6:

ARTICLE 31: CONSERVATION FUND

To see if the Town will vote to raise and appropriate or transfer from available funds, a sum of money to be placed in the Conservation Fund, established under the provisions of Massachusetts General Laws Chapter 40, Section 8C, or pass any vote or votes in relation thereto. (Inserted by Conservation Commission and Community Preservation Committee)

Voted majority yes (3 no) that the Town transfer from the Community Preservation Fund the sum of \$200,000 to be placed in the Conservation Fund, established under the provisions of Massachusetts General Laws Chapter 40, Section 8C.

Discussion for CPA Project Database: In addition to Municipal Affordable Housing Trust Funds mentioned above, CPA funds are often transferred to a Conservation Fund. When an appropriation is to a fund, select the "Y" radio button on the "Project Info" page next to "Is the appropriation to a fund/trust (specific project work to be determined at the discretion of the fund/trust?"

In these cases, the exact use of the money is often not known at the time that the legislative body approves the appropriation. In subsequent years, once the funds are actually spent by the Conservation Commission to purchase land, the details of that expenditure should be entered in the project database as a new project. The cost of the project should be entered on the "Project Funding Source" page in the box labeled "From a Trust/Fund."

Project Info		next >>
Project Name:	<p>If the project is another phase of an existing project, please choose the name, otherwise choose "NEW PROJECT" (Please do not provide bond payment info).</p> <div style="border: 1px solid black; padding: 2px;">NEW PROJECT</div>	
Name of New Project:	<div style="border: 1px solid black; padding: 2px;">Transfer to Conservation Fund</div>	
Approval Date: (Date of Town Meeting or City Council Vote to Approve Expenditure)	<div style="display: inline-block; border: 1px solid black; padding: 2px;">July</div> <div style="display: inline-block; border: 1px solid black; padding: 2px;">5</div> <div style="display: inline-block; border: 1px solid black; padding: 2px;">2008</div>	Project Status: <div style="border: 1px solid black; padding: 2px;">Project in planning stage</div>
Project Type (choose all that apply):	<input checked="" type="checkbox"/> Open Space <input type="checkbox"/> Community Housing <input type="checkbox"/> Recreation <input type="checkbox"/> Historic Preservation	
Is the appropriation to a fund/trust (specific project work to be determined at the discretion of the fund/trust)?	<input checked="" type="radio"/> Y <input type="radio"/> N	
Project Description:	<div style="border: 1px solid black; padding: 2px;">Transfer from the Community Preservation Fund the sum of \$200,000 to be placed in the Conservation Fund.</div>	
Does this phase of the project involve purchasing a legal interest in land (fee, CR, APR, etc)?	<input type="radio"/> Y <input checked="" type="radio"/> N	

Project Funding Source		next >>
Transfer to Conservation Fund, Approval Date 7/ 5/ 2008		
Please identify each of the funding sources that make up the total expenditure for this project. We're looking to capture the total funding necessary to complete this project, not just the funds requested in the warrant article or city ordinance.		
For CPA expenditures, if you know or can estimate the dollar amount for each CPA category, complete the appropriate boxes. Otherwise, just put the category-unknown CPA dollar amount in the "CPA TBD Amount" box:	CPA Open Space Funds: <div style="border: 1px solid black; padding: 2px; width: 100px;">200000</div> CPA Housing Funds: <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> CPA Recreation Funds: <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> CPA Historic Funds: <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> CPA TBD Amount: <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> CPA Bonded Amount: <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> CPA Total: <div style="border: 1px solid black; padding: 2px; width: 100px;">200000</div>	Bond Term <div style="border: 1px solid black; padding: 2px; width: 50px;">0</div>
Non CPA Funds	From a Trust/Fund (Affordable Housing Trust Fund, Conservation Fund, Land Acquisition Fund or other such fund) <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> Other Town Funds (Non-CPA): <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> Private Donations: <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> State Funds (self help, APR program, etc): <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> Federal Funds: <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> Other (Please describe below): <div style="border: 1px solid black; padding: 2px; width: 100px;">0</div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	
	Total Project Cost: <div style="border: 1px solid black; padding: 2px; width: 100px;">200000</div>	

Geographic Information		next >>
Site Address:	Does project have street address or other physical location? <input type="radio"/> Y <input checked="" type="radio"/> N	